FINANCIAL PLANNING FOR DEPLOYMENT CHECKLIST

Important Documents

___ Do you have a will?
___ Is your Record of Emergency Data (Page 2) current?
___ Is the correct beneficiary listed on your SGLI and any other insurance?
___ Do you need to leave Powers of Attorney with anyone?
___ Will ID Cards/DEERS enrollment need to be updated?

Financial Planning

___ Do you have a written monthly spending plan for the deployment? (Get a Financial Planning Worksheet from your CFS.)
___ Sign up for the Saving Deposit Program (SDP).
___ Do you plan to do your taxes while deployed? Do you have a Specific Power of Attorney?

Does your spending plan include amounts for possible income changes such as:

___ Sea pay starting or stopping
___ Family Separation Allowance (FSA)
___ Promotion while deployed
___ Reenlistment bonuses or any other special payments
___ Tax-free earnings
___ Combat Duty Pay

Does the spending plan include amounts for:

___ Port visits
___ Long distance phone calls

___ Gift/souvenirs
___ Savings for vacation after the deployment
___ Are you enrolled in the Thrift Savings Plan (TSP)?

Banking and Bills:

___ Is your pay set up the way you want? (DDS to correct account(s), split pay, Navy Cash Card, allotments, online banking, and automatic check drafts?)
___ Do you have overdraft protection for your checking account?
___ Will your debit/credit cards expire during your TAD assignment?
___ How will you be making payments to creditors? Do they have your correct address?
___ Are there any annual/quarterly expenses such as car or home insurance or tuition payments due while you are deployed? If so, when are they due and how will they be paid?
___ If married, have you discussed who will be using which credit cards and set spending limits?
___ If married, are you using joint or separate checking accounts? If joint, have you discussed how you will manage?

Housing

___ If planning to sublet your house or apartment did you do a credit check on potential tenants?
___ Is your renter’s/homeowner’s insurance current and does it cover replacement costs?
____ Do you have a plan for routine maintenance and lawn care?

Vehicles
____ Do you have a safe place to store your vehicle and/or someone to take care of it?
____ Will insurance, tags, registration, inspection and/or base stickers expire while deployed?
____ Is all routine maintenance complete?

Communication
____ Do you have a plan for making telephone calls?
____ Have you discussed e-mail use?
____ Have you discussed regular mail and care packages?
____ Have you discussed emergency communication?

Emergency Plans
____ Do you have at least one month’s pay saved in case of financial emergency?
____ Do you need to consider signing a preauthorization form with Navy-Marine Corps Relief Society?
____ Does your family know your official mailing address, command name, and Social Security number?
____ Does your family have the command ombudsman’s telephone number?
____ Does your family know how to use the American Red Cross in case of an emergency?

Individual Augmentees (IA)
____ Have you obtained a Government Travel Charge Card (GTCC) or Advance Per Diem (if GTCC cannot be issued)?
____ Do you know how to contact the Center of Excellence (COE) to which you are assigned in the event that you have questions about pay and personnel issues?
____ Are you aware of your IA assignment related entitlements and potential changes in pay?
____ Do you know how to contact ECRC in the event that you need specific information on pay or entitlement issues?
____ Have you secured transportation and lodging reservations through NAVY SATO to ensure full reimbursement?
____ Do you know where to send and how to submit your travel claims and receipts?
____ Do you know how to access and submit forms for reimbursement of miscellaneous expenses, (SF) 1164 and/or DD Form 2902?

See your Command Financial Specialist for more information.